

Patient Payment Plans: Reporting

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If your office allows patients to pay off their balances via a monthly payment plan, it may be helpful to see the amounts that are expected to be received per month.

1. You can find this information by navigating to **Reports > Patient Payment Plan Report**.

All of your patients who are on a current payment plan will be listed with information such as their date of next payment, and remaining balance, among other key information. You can sort the columns by pressing on the up/down arrow next to the column name. From there, you can manually process the payment.

Patient Payment Plan							
⌵ Patient	⌵ Plan Creation Date	⌵ Date of Last Payment	⌵ Date of Next Payment	⌵ Next Payment Amount	⌵ Remaining Balance	⌵ Original Total	Action
Peter Django	08/29/2023	N/A	12/30/2023	\$16.67	\$100.02	\$100.02	<input type="button" value="Pay"/> <input type="button" value="Skip"/>
Amy (Demo) Martinez	11/15/2023	N/A	12/31/2023	\$133.76	\$3210.33	\$3210.33	<input type="button" value="Pay"/> <input type="button" value="Skip"/>
Heather (Demo) Hill	11/16/2023	N/A	12/31/2023	\$333.40	\$2000.45	\$2000.45	<input type="button" value="Pay"/> <input type="button" value="Skip"/>
sample sample	11/20/2023	N/A	12/31/2023	\$25.00	\$125.00	\$125.00	<input type="button" value="Pay"/> <input type="button" value="Skip"/>
Christopher (Demo) Cox	12/04/2023	N/A	01/17/2024	\$135.50	\$3252.17	\$3252.17	<input type="button" value="Pay"/> <input type="button" value="Skip"/>
Kenneth (Demo) Parker	12/04/2023	N/A	12/08/2023	\$218.25	\$3492.01	\$3492.01	<input type="button" value="Pay"/> <input type="button" value="Skip"/>